

Manual

English

KOI Desktop App 2.0.x

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Introduction

Information on how to use the documentation

The user documentation is aimed at both first-time and advanced users of KOIblue. The documentation is intended to help you get started with the program, offer assistance in solving problems and provide helpful further information that allows you to use the software more efficiently.

System requirements:

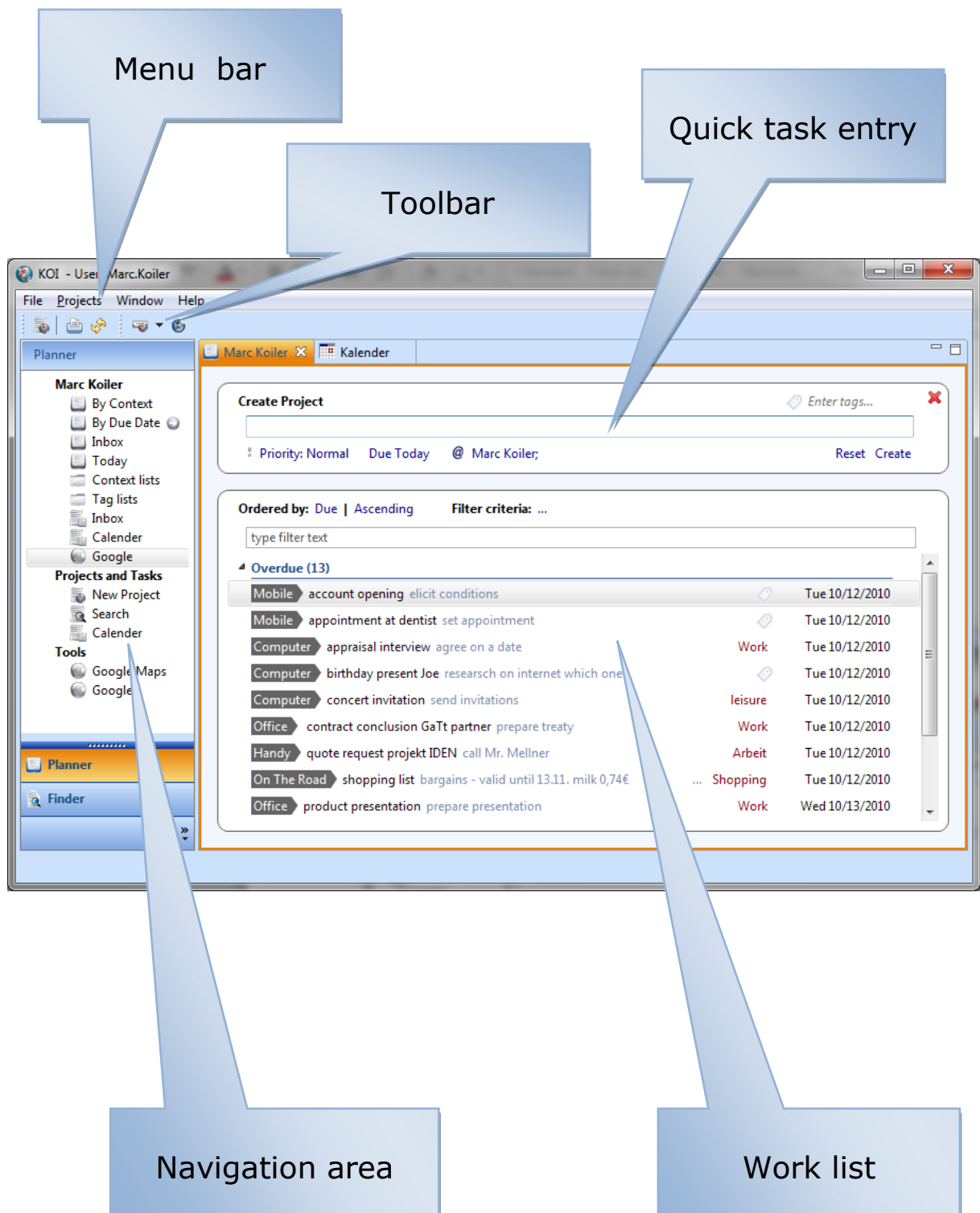
120 MB free hard disc space
512 MB main memory
Java 1.5 or higher
Win XP or higher

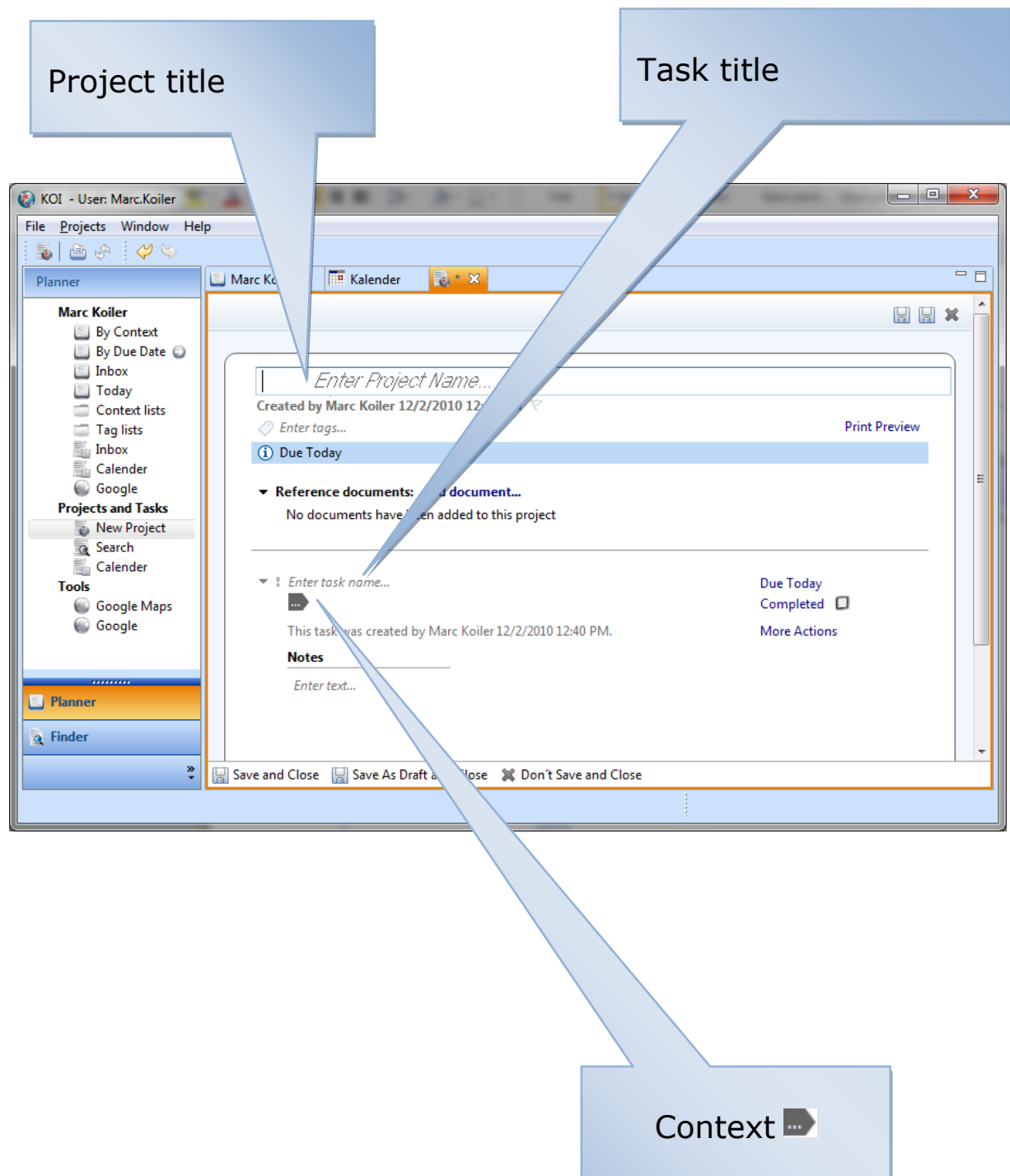
Compatibility

Microsoft Office 2003 or later
Microsoft Outlook 2003 or later

Description of the user interface



Work list view:



Open project view:

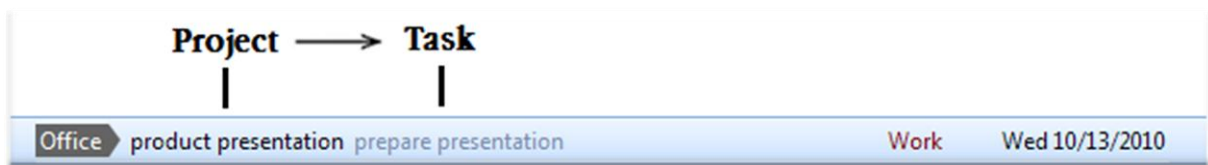
Product features

Create a new project (3 options)

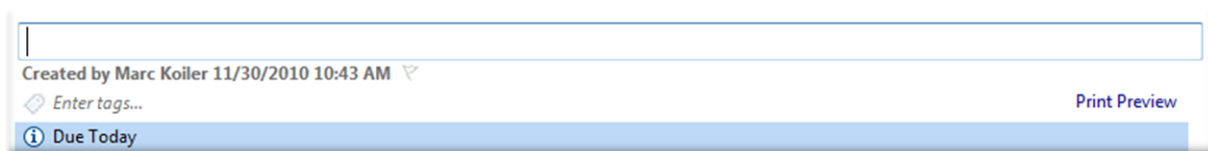
- Click the **New project** button on the toolbar 
- Right-click on the work list and select **New project** from the context menu
- Open the Quick data entry by clicking the "Quick data entry" button on the toolbar. 

Project title

The name of the project as displayed in the work list is the project title. It is important as you can use it on the work list to assign a task to your project.



After opening a new project the cursor is positioned in the field where you are expected to enter the project title. Enter the project title here.



The screenshot shows a text input field for entering the project title. Below the field, there is a status bar with the following information: 'Created by Marc Koiler 11/30/2010 10:43 AM', a tag input field labeled 'Enter tags...', a 'Print Preview' link, and a 'Due Today' indicator.

Tags

Assign tags (labels) to better categorize projects.

Example: You might have a context¹ >Cell phone< containing private and business calls. During your free time you do not want to see the business calls which you still have to make. So just select the tags search filter >Private< and only those tasks of the >Cell phone< context are listed which you can actually handle.

Click on **Enter tags** below the task title. Enter the tag. An unlimited amount of tags can be used.

Helpful hint! For sake of clarity it is recommended that you do not assign too many different tags. Enter a description as a "Tag" which defines your task more precisely so that you can find it more easily. Tags which have already been used are available as suggestions.

Tracked projects

By means of this mark (flag) you can add a special icon to the project to find it more easily. For information on how to search for tracked projects refer to the "Task search" section on page 25.

The date of creation of the project can be found below the project title. A little white flag is shown to the right of the date of creation. Click on the flag and it turns red. In this way you marked the project as a tracked project.



In the search results tracked projects are also marked with a red flag.

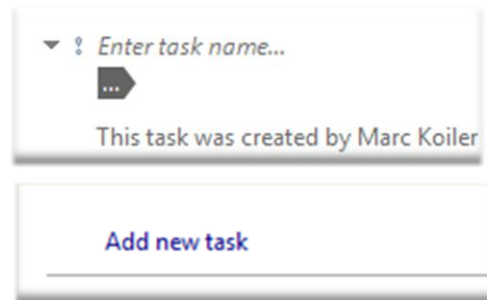


¹ See the explanation in the "Context" section, p. 6

Task title

The task titles indicate the physical activities you need to perform in order to complete the projects.

Click **Enter task title...** and enter the first task. By clicking on **Add new task** you can assign more tasks to the project.



Context

The context indicates where you can perform the activity.

Example: You want to tidy up your desk. You can only perform this activity in the office. So you select the context "@office".

To enter a context, click on the icon provided below the activity title.



HELPFUL HINT! Example: Since all tasks are now accessible all the time, you can avoid idle time. You are waiting in a café for your business partner and want to make good use of your time. By calling all tasks of the "Calls" context, a list of phone calls to be made is displayed and you can select an entry.

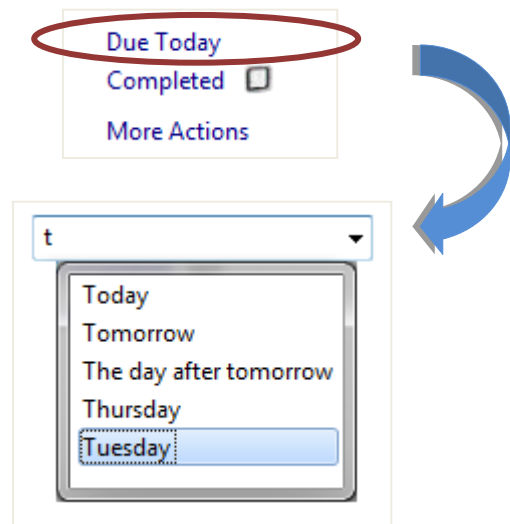
In the settings the number and titles of contexts can be chosen freely. (see the "Settings" section)

Due date

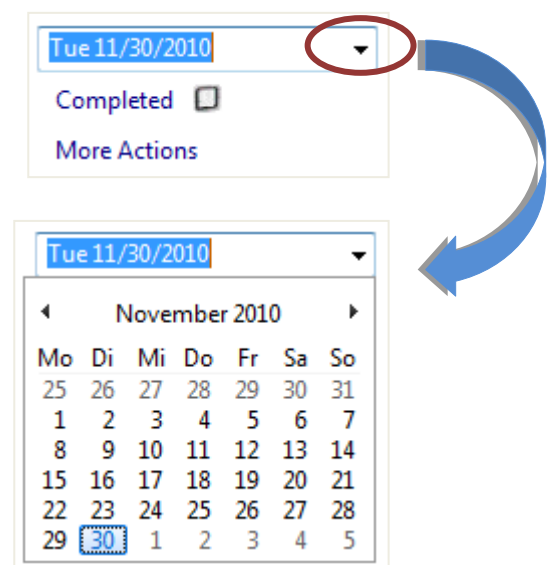
The due date indicates the date by which the task must be completed.

HELPFUL HINT! Example: This is how you are reminded of your task on time or, if uncompleted, it will be displayed in the work list under "Overdue".

Click on **Due on weekday DD.MM.YYYY** on the right next to the task title. You can manually enter Today, Tomorrow or The day after tomorrow by entering the initial letters.



A click on the arrow next to the date opens a calendar where you can choose the date. If you do not set a due date, it will be set by default to "Today". To change the default setting see the "Settings" section.



Reference material

Click **Add document** to access the file explorer. Then locate the folder and select the file you want to add to the task.

Alternatively, you can drag any document via drag and drop to **Add document** and the document will also be saved in the project.

Notes

Here you can add notes related to a particular task.

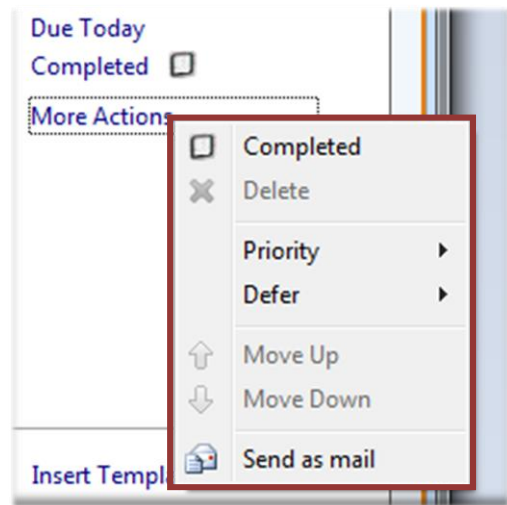
You can manually enter the note. It is also possible to drag contents via Drag & Drop from another window into the note field.

Helpful hint! Drag the contents from the web browser or the URL of the site you are visiting into the note field. In this way you save the information required for the task. The next time you access the task KOI displays the website on request.

Other actions

For every task you have the option to select "Other actions". The following options are available:

- Mark a task as completed
- Specify the priority of a task
- Defer a task (Set the due date for Today, Tomorrow or Next week)
- Move a task further up or down (This list can only be created if there are more tasks available)
- Forward the whole task as an email message (Outlook is required to do so). The task title becomes the subject of the email and the project title the reference. The note is sent as the content of the email. The due date is also sent and displayed as such within the email.



Save as template

This feature offers you the option to define a one-time solution for tasks and their sequence for recurring use in future projects. You can insert it as a template when required.

Create a project, add the necessary tasks and bring them into the correct order – in this way, the process can be saved as a template for future use.

Insert a template

Here you can insert tasks, which you planned in the past and saved as a template, into the newly created project. Therefore it is unnecessary to plan and organize the workflow again. Instead, you can immediately start to execute and optimize the workflow.

Printing

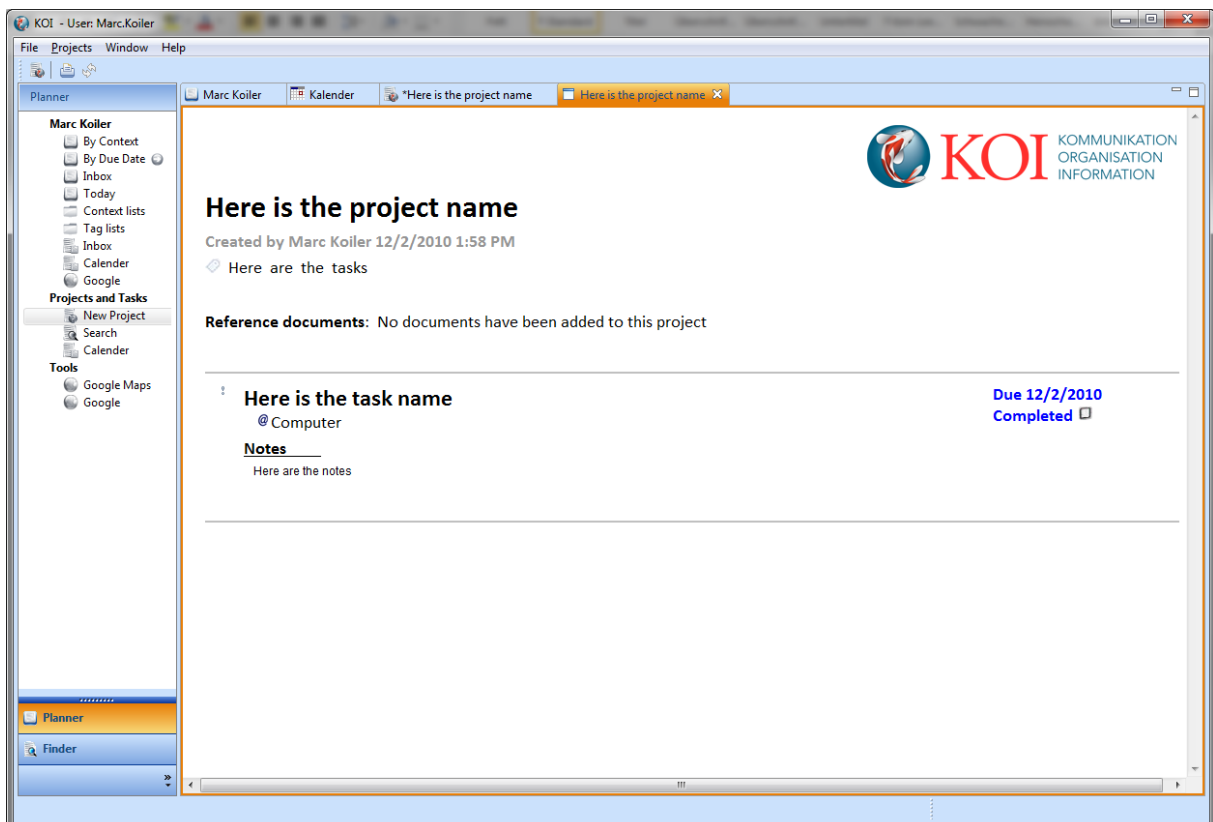
Click **File**, and then **Print** or select the "Printer" icon to open the print menu. Here you can choose the print options.



The content of the red framed section of the window will be printed. Since several tabs can be displayed, only the content of the currently open tab will be printed.

Print view

Click **Print view** in the open document to see the preview and what the printed project will look like. To print click **File** and then **Print** on the menu bar.



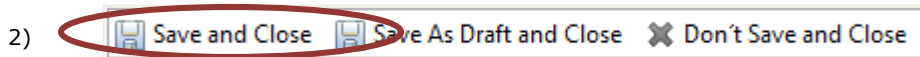
Example Print view:

The content of the currently open tab will be printed. It is always displayed within a red frame.

Save and close

The task is saved and added to the work list.

Click on the left floppy-disc icon (1) on the top right to save the task. Alternatively, click **Save and close** (2) at the bottom of the screen.



Save as draft and close

When you save a project as a draft, the draft is treated in the same way as a task. However, you cannot mark any task of a draft as completed. In order to complete a task, you must save the project first.



A project at the draft stage can be deleted again. To do this, open the draft and click "Discard and close" on the top right (1) or at the bottom (2) of the draft.



Do not save and close

If you have opened a new project but do not want to save it, discard it by clicking **Do not save and close**. This causes the data you have entered so far to be lost.



Edit project

In order to view, edit or complete an existing project double-click the desired project in the work list or right-click the project and select **Open project** from the context menu.

A new tab "Edit project" opens where you can edit all entry fields in the same way as when you create a new project.

Complete a task

When a task is completed, the next task of the project is displayed in the work list.

Open the project and tick the "Completed" check box. The second option to mark a task as completed is to right-click the task in the task list and select **Completed** from the context menu.

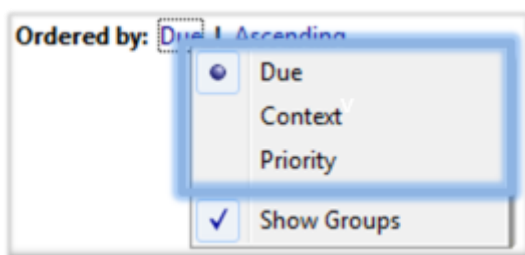
If the task you just completed is the last one of the project, the project is removed from the work list and can only be viewed using task search. If the completed task is not the last one of the project, the next task of the project will automatically be displayed in the project list.

Task list

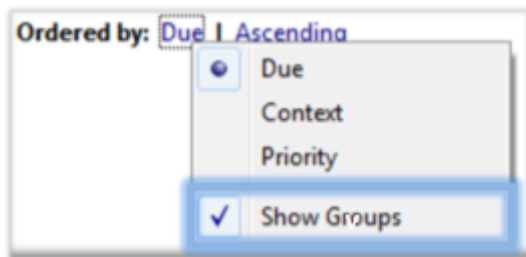
The task list provides you with a full overview of all uncompleted tasks. You can sort the task list according to several criteria to easily maintain an overview.

Order

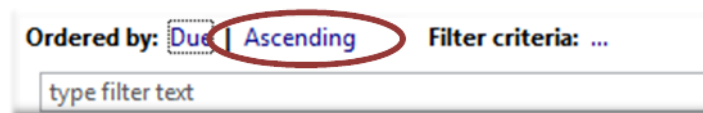
Sort your tasks in the task list based on the criteria due date, context or priority. To do this, click on the Due date next to "Sorted by:" and select the particular sort order.



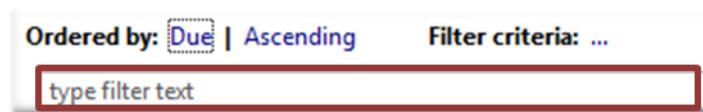
The tasks in the default view are arranged in groups to provide an easy overview. To deactivate the groups, click on the currently active order next to "Sorted by:" and then **Show in groups** (contains a tick mark). Now your work list view is displayed ungrouped.



In order to display your tasks in ascending or descending order click in the same line as the filter settings either **Ascending** or **Descending**.



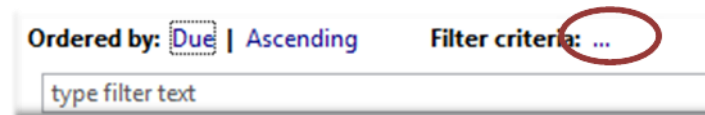
You can quickly find a particular task by entering keywords taken from the task title. To do this, click in the text field and enter the task title.



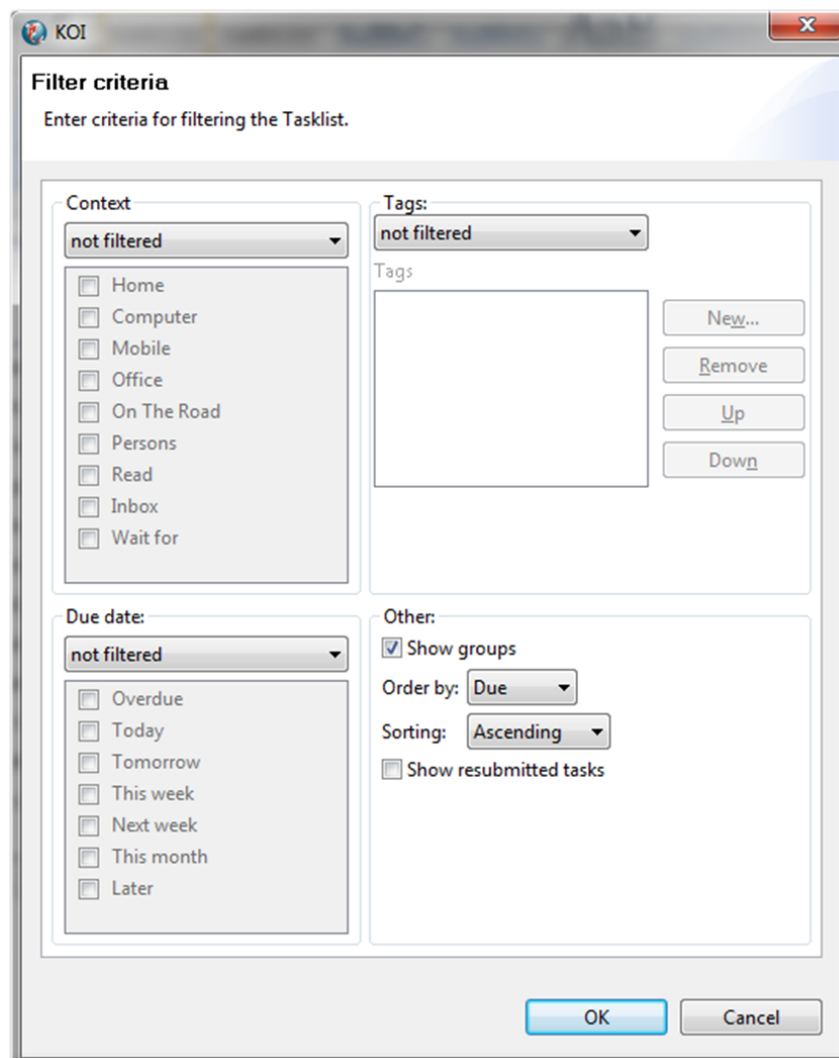
Filter criteria

The filter criteria allow you to restrict the order of the projects and tasks displayed in the work list.

Click next to "Filter criteria:" to access the settings.



Enter the desired criteria of the tasks to be displayed in the task list. Here you have the option to filter the results by context, Tags and Due date.

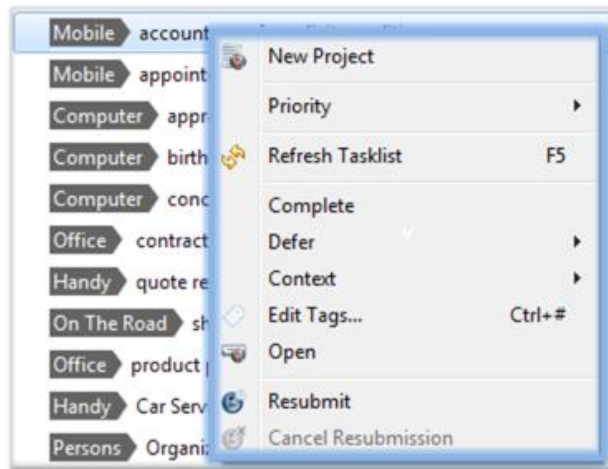


Under "Other" you can use the settings menu to change the order of the results.

Quick menu for task management

Right-click a task in the work list to access the following context menu:

- **New project**
Opens a new project
- **Priority**
Changes the priority of a task
- **Update the task list**
Updates the task list by using current data and displays them in the task list.
- **Complete**
When a task at hand gets completed the next task of the project is displayed. If the task at hand is the only or last task of the project, the whole project is completed and removed from the work list.
- **Defer**
Set the due date of an upcoming activity to any date.
- **Context**
Change the current context here.
- **Open project**
Open the project for viewing and editing.
- **Follow-up**
The task remains hidden from the work list until your specified date and will only be displayed from that date.



HELPFUL HINT! Example: You enter a task at the moment you think about it although you can only complete it at a later stage. The purpose is to ensure that no tasks remain unattended, are forgotten or overlooked. Everything is recorded in a reliable system and you do not need to deal with the anxious feeling that you might have forgotten something. Meanwhile, you keep an overview over the current tasks in your task list.

In order to show the follow-up tasks in the work list, click the "Follow-up tasks" button on the toolbar. Use this button to alternatively hide or show follow-up tasks in the work list.



- Cancel follow-up: This button cancels the follow-up of a task. Now the task is displayed in the work list again.

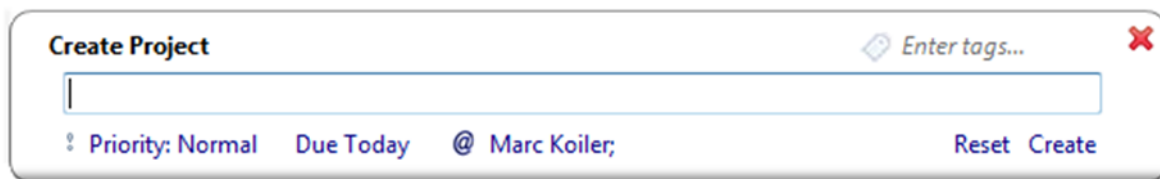
Quick task entry

Quick task entry allows for easy entry of tasks. A task can be created here, however, projects cannot be planned.

To access the Quick task entry click on the "Quick task entry" button.

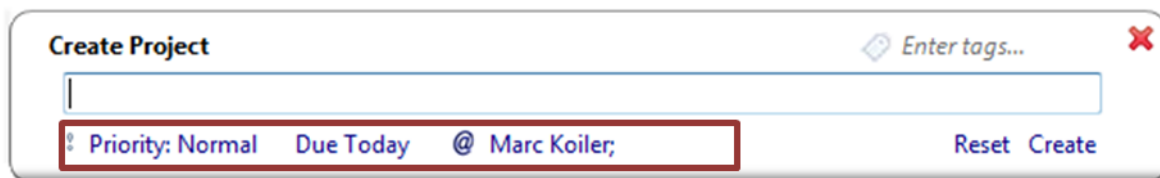


This prompts a window to open in the Work list where you can quickly and easily enter new tasks without having to open a new project.

A screenshot of a 'Create Project' dialog box. It has a title bar 'Create Project' with a close button (X) on the right. Below the title bar is a text input field. To the right of the input field is a tag input field labeled 'Enter tags...'. Below the input field are several blue links: 'Priority: Normal', 'Due Today', '@ Marc Koiler;', 'Reset', and 'Create'.

In addition to the task title you can also set the priority, due date, contexts and tags in the Quick task entry.

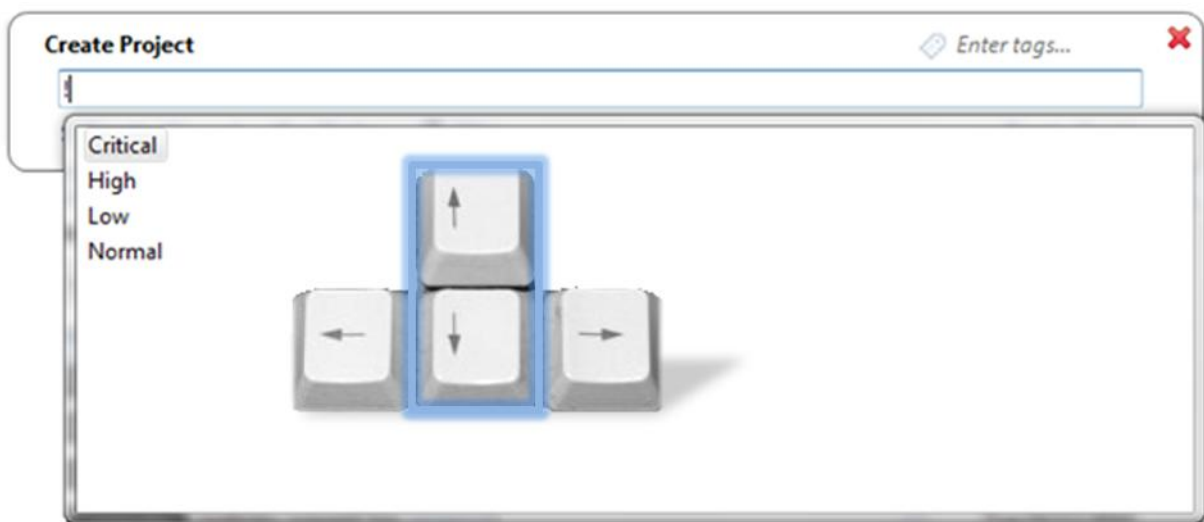
Click on the terms in blue below the text input field and enter the priority, due date and context. The tags are entered on the right hand side above the text input field.

A screenshot of the same 'Create Project' dialog box as above. A red rectangular box highlights the blue links below the text input field: 'Priority: Normal', 'Due Today', '@ Marc Koiler;', 'Reset', and 'Create'.

SmartAdd

It is possible in Quick task entry to enter the priority, due date and tags by using the Intelligent data entry assistant. To do this, type the predefined character which you specified in the settings into the task title field and the options are displayed. Use the arrow keys to select the particular term and confirm the entry with Enter. In order to execute the command correctly the character must always be followed by a space.

Example: "! high # Private ^ Make dental appointment tomorrow" becomes the task "Make dental appointment" with the priority: high, the Tag: private and Due date: tomorrow.



How to change the settings of the predefined characters of Smartadd is explained in the "Settings" section on page 22.

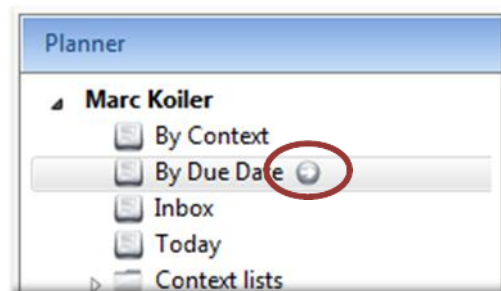
Smartfolder

Here you create folders to keep the information which you access frequently. Since these folders are always visible on the navigation area to the left, easier and quicker access to the preferred data is provided.

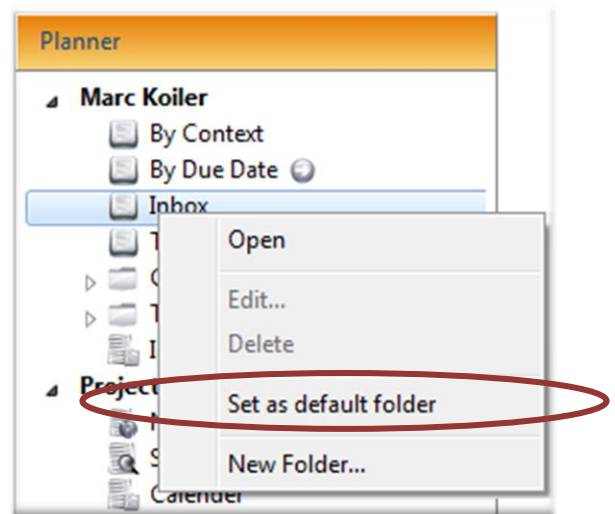
Standard folders

The standard folder contains all tasks ranked according to particular criteria. The view of the standard folder is the default view which you can see every time you open the work list.

The standard folder is the folder in the navigation area with a red arrow to the right of it.

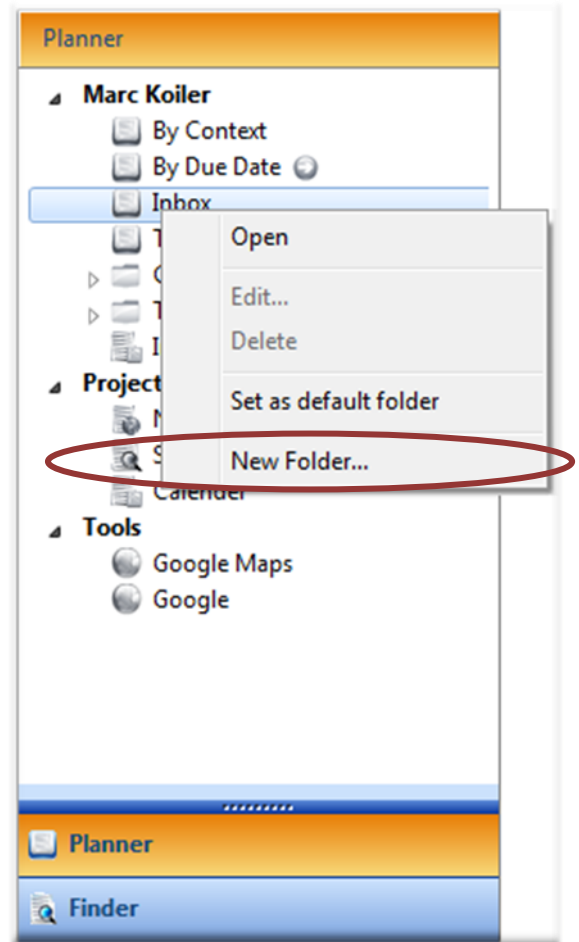


You can specify any folder as a standard folder. To do this, right-click the desired folder and select **Set as standard folder** from the context menu.



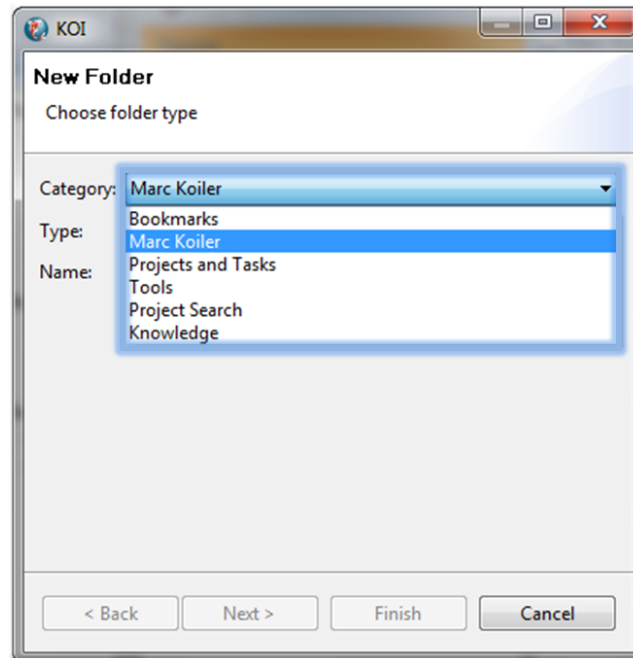
Create new Smartfolder

Right-click in the white space of the navigation area and select **New folder**. The following window opens where you can assign a category, type and name to the folder.



Category

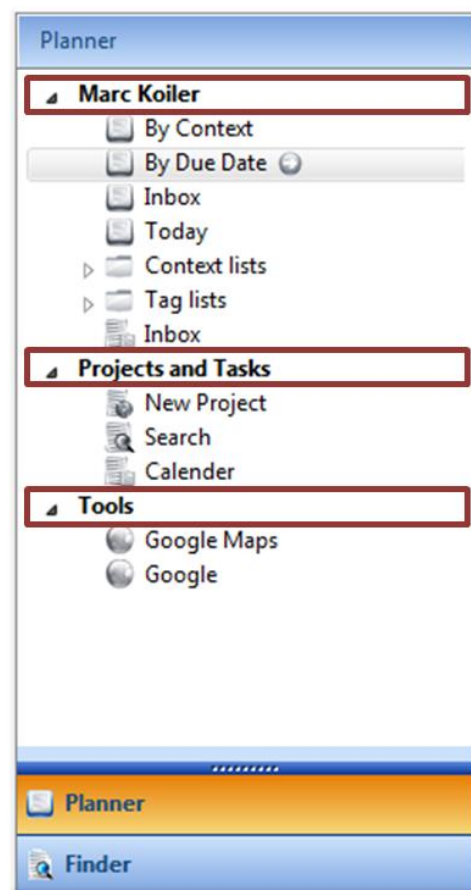
The category determines where the folder will be displayed. The categories User name, Projects and tasks and Tools are displayed in the planner view. The categories Tools, Project research, and Documents and knowledge are shown in the finder view.



User name (in your version you can see here your own user name) - the folder appears in the navigation area in the planner view under "User name".

If you select the "Projects and tasks" category, the folder appears in the navigation area in the planner view under "Projects and tasks". The figure on the right shows an example of a newly created folder in this category.

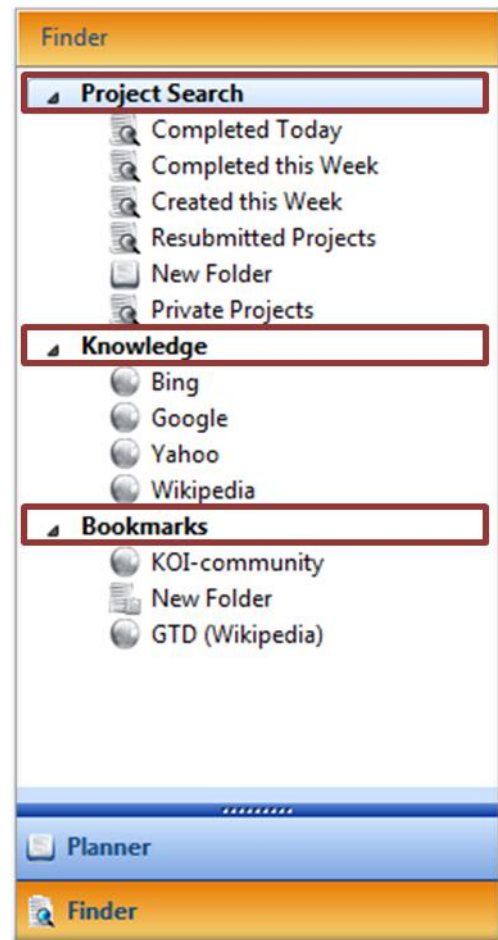
If you select the "Tools" category, the folder appears in the navigation area in the planner view under "Tools".



If you select the "Project research" category, the folder appears in the finder view under "Project research". The figure on the right shows an example of a newly created folder in this category.

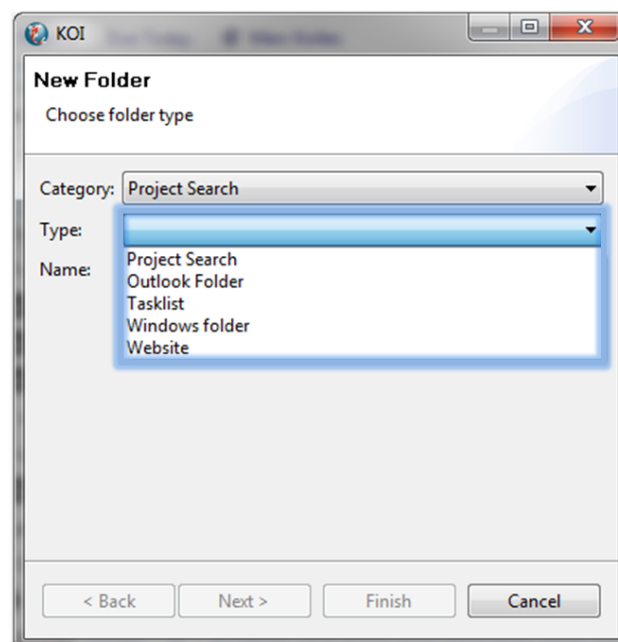
If you select the "Documents and knowledge" category, the folder appears in the finder view under "Documents and knowledge".

If you select the "Bookmarks" category, the folder appears in the finder view under "Bookmark".



Type

The type indicates what kind of data is contained in the folder.



• Project search

Such a folder contains all the projects within the parameters that you specified here.

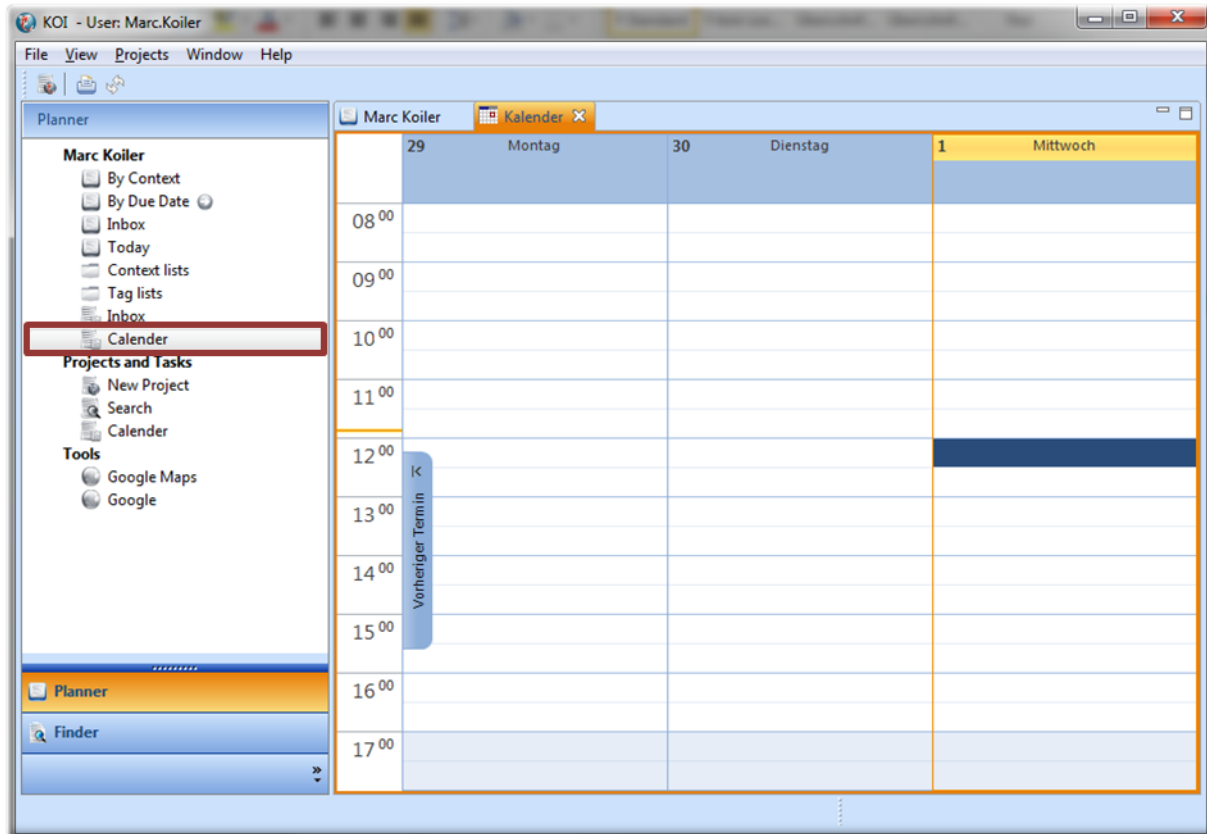
Select this type and click **Continue**. A window opens showing the parameters by which you define what projects are displayed in the folder.

* The Task filter is an option which is irrelevant to the KOIblue version. Please learn more about this feature in the manual of the KOIgold version.

• Outlook folder

Here you can create an Outlook folder by entering all the Outlook folders in order to reproduce their contents in KOI.

Helpful hint! Create an Outlook folder with an Outlook calendar to display the calendar view next to your tasks:



• Task list

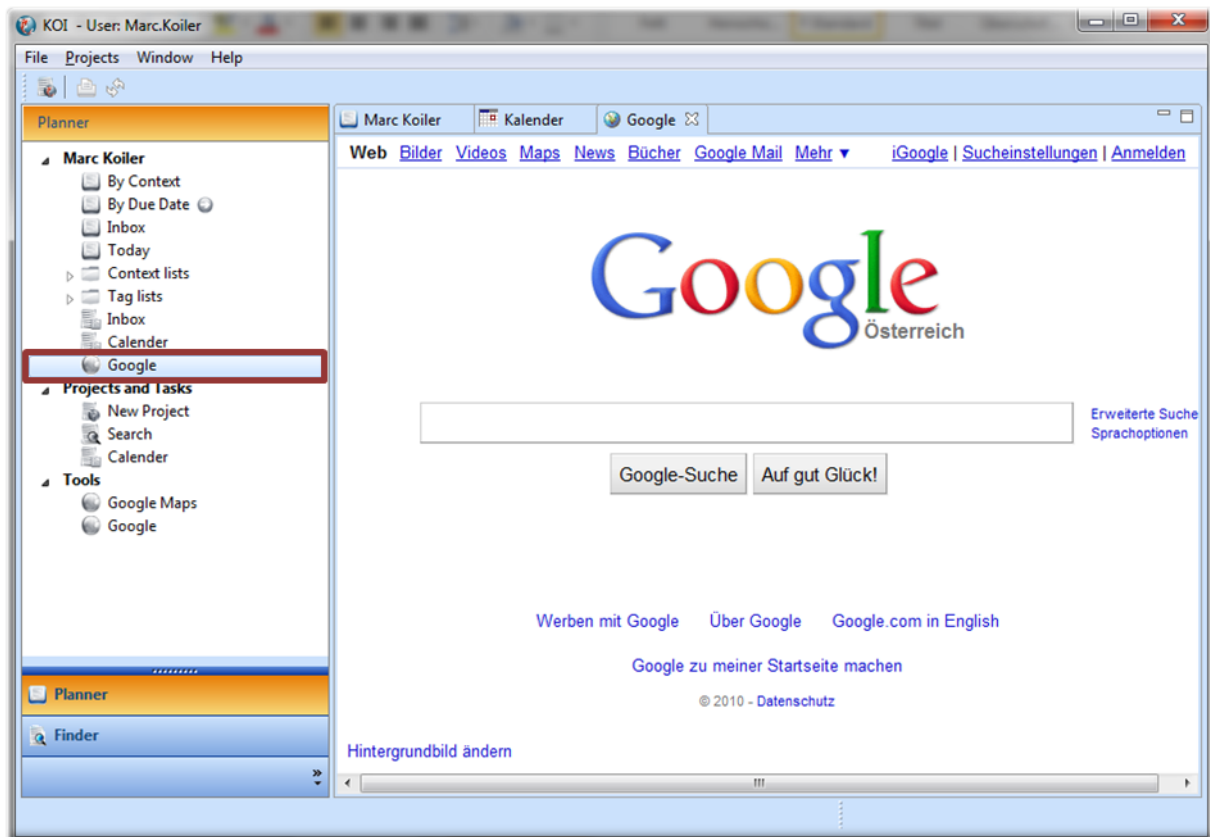
Here you can apply several filters (context, tags, due date, etc.) to show only specific tasks in the work list.

• Windows folder

Here you can select local folders of your computer in order to access their contents more easily via KOI.

• Website

Here you can enter an URL of a website to be opened in KOI. The example below shows a folder with search engine content.



Name

Here you indicate the name of the folder which can be chosen freely.

When you have entered the name, click **Continue**.

Task search

With the task search you find all the tasks you have ever created. Therefore, you can also view completed tasks and follow-up tasks here. However, you cannot edit the tasks.

Click **Tasks** and **Search projects** on the toolbar to access the task search.

You have the option to search the library by using keywords. To do this, enter the search terms in the text field.

Click **Details** to narrow your search results according to several parameters. Different task filters, activity filters and filter settings are available.

Search Tags

Details [Reset Filter](#)

Project Filter

Status: ☐ Tracked only

Created: By:

Completed:

Task Filter

Task Status: Performer:

Filter Settings

Text Search: Tagsearch:

Result: Sorting:

Sorted by: Description [Still no search performed](#)

Project filter

- Status: "Open" shows only those tasks which have not been completed yet
"Completed" shows only completed tasks
"Any" is set by default and shows both uncompleted as well as completed tasks
- Created: If you know the date on which the task was created, enter the date of creation here. Several options are provided (Any, Today, Yesterday, This week, Last week, This month, Last month). Custom allows you to enter a period in which the tasks were created.
- Complete: If you know the date on which the task was completed, enter the completion date here. Several options are provided (Any, Today, Yesterday, This week, Last week, This month, Last month). Custom allows you to enter a period in which the tasks were completed.

Example: It is possible to enter a period and only display completed tasks. In this way you can check which tasks were completed e.g. in a month.

Task filter

- Status: This feature is not yet available in KOIblue. Currently it is only relevant to KOIgold.

Filter settings

- Text search: All text fields- the query term is searched for in all entries made for the task.
- Titles only: The query term is only searched for in the project titles
- Result: here you can enter the maximum number of returned elements.
- Tag search: when searching for tags you can enter if you search for whole words or parts of words. To do this, enter the part of the word followed by a space character. When you use many tags and some of them are partially identical, it might be helpful to display all the tags which are similar.

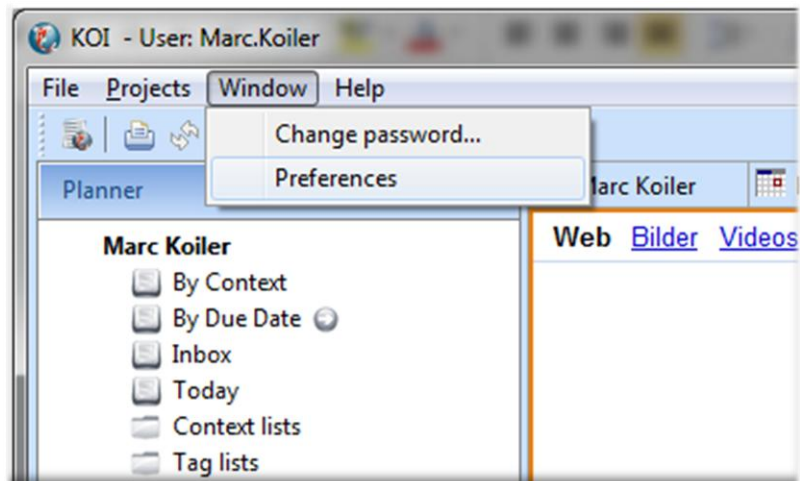
Example: You are running a project of a bigger nature in your company for which you create several tags, e.g. "Project XY development", "Project XY marketing", "Project XY sales". Now you want to view all tasks which contain the project XY. When searching for the tag enter "Project XY [space character]"

- Sort order: here you can indicate according to which criteria the search results should be ordered.
- Tracked only: activate this filter to display only the tracked tasks in the hit list.

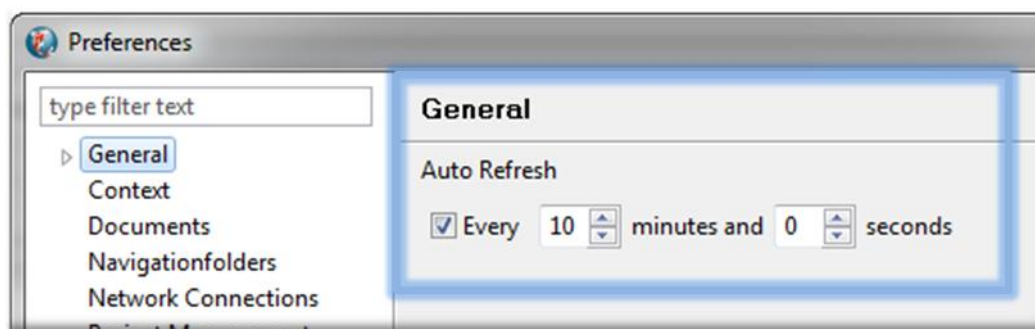
Settings

Here you can change the default settings and adjust the graphics.

To open the settings click **Window** and then click **Preferences** on the toolbar.

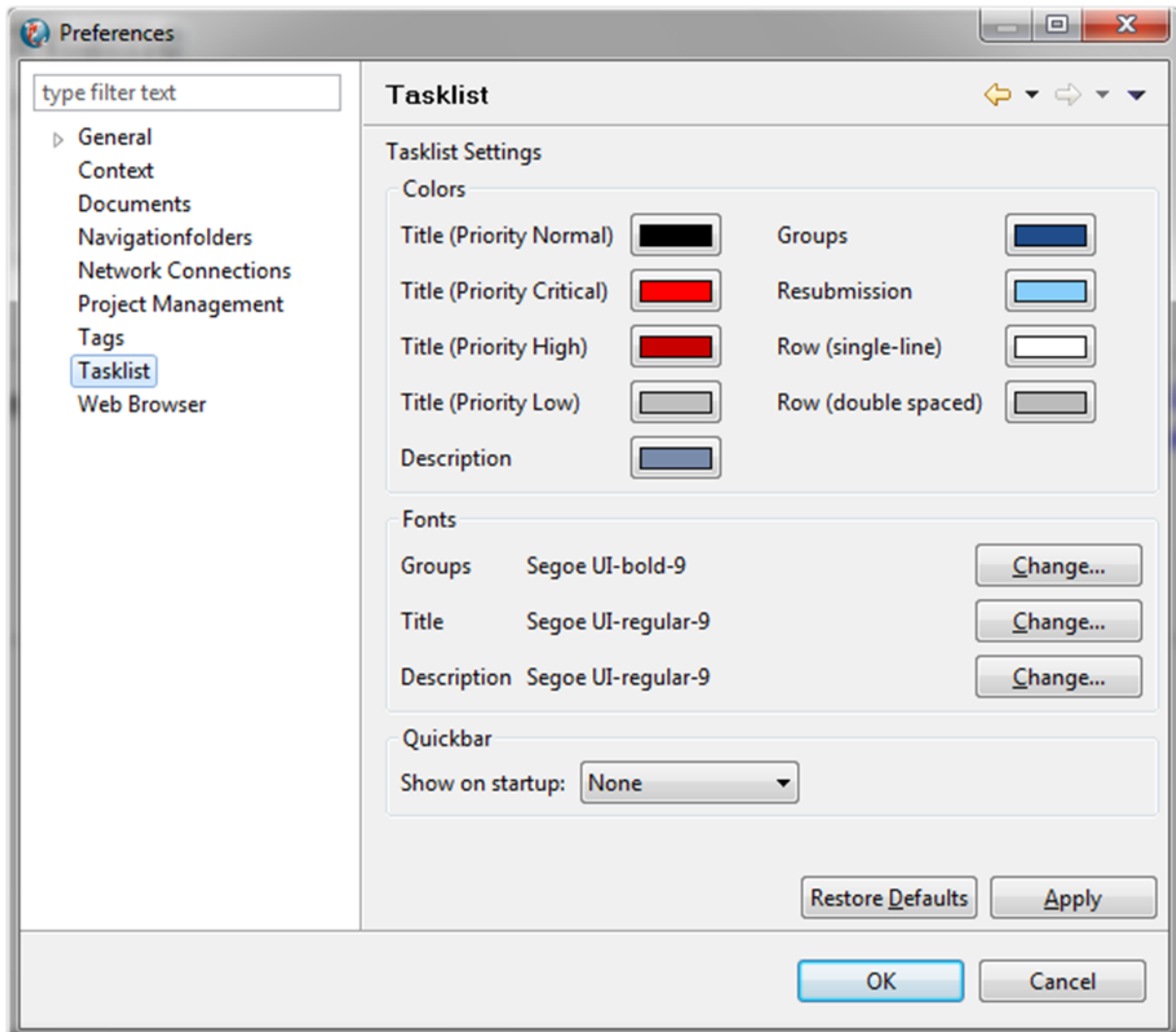


General



Automatic update – Here you can configure the automatic update. Indicate the period of time which should pass between the single updates. To disable the automatic update, deactivate the "All" checkbox. If the tick is not visible and the writing is greyed out the automatic update is not performed.

Task list



Here you can configure the visual display settings of the work list. Thus, you can customize KOI to suit your personal style.

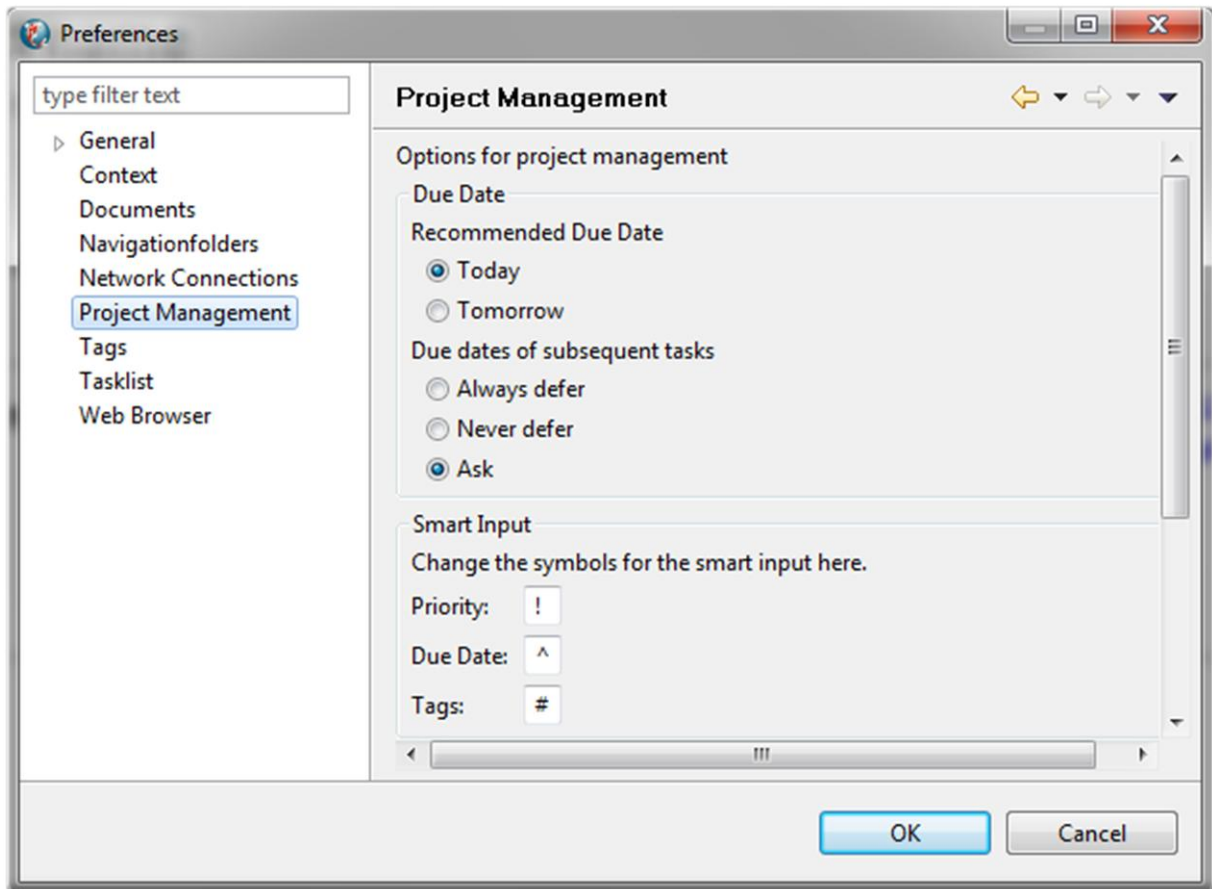
Colours: Here you can set the colours in which to display the work list. Click on the colour field of the title that you want to change. A window will appear where you can choose the desired colour. Click "OK" to confirm.

Fonts: Here you can change the font style. Click **Change** and choose the font, face, size, effects, colour, script and click "OK" to confirm.

To reset the default settings click the **Reset default settings** button.

To apply the selected settings in the work list click the **Apply** button.

Project Management



Here you can configure the default settings for new tasks. The settings are preset and remain the same when you create a new task unless you change them.

- Due date suggestion

When you create a new task, a default value has already been entered in the "Due date" field. Select "Today" or "Tomorrow" depending on which value should be used.

- Due date of subsequent tasks

When you open a task which consists of several activities and change the due date of an activity, the subsequent activities might be affected. Often, the subsequent activities must be deferred. The following settings are possible:

Always defer: The subsequent activities are also deferred automatically.

Never defer: The due date of the subsequent activities remains the same.

Ask: If you change the due date of an activity, a window opens with a request to confirm for the particular task if the subsequent activities should be deferred.

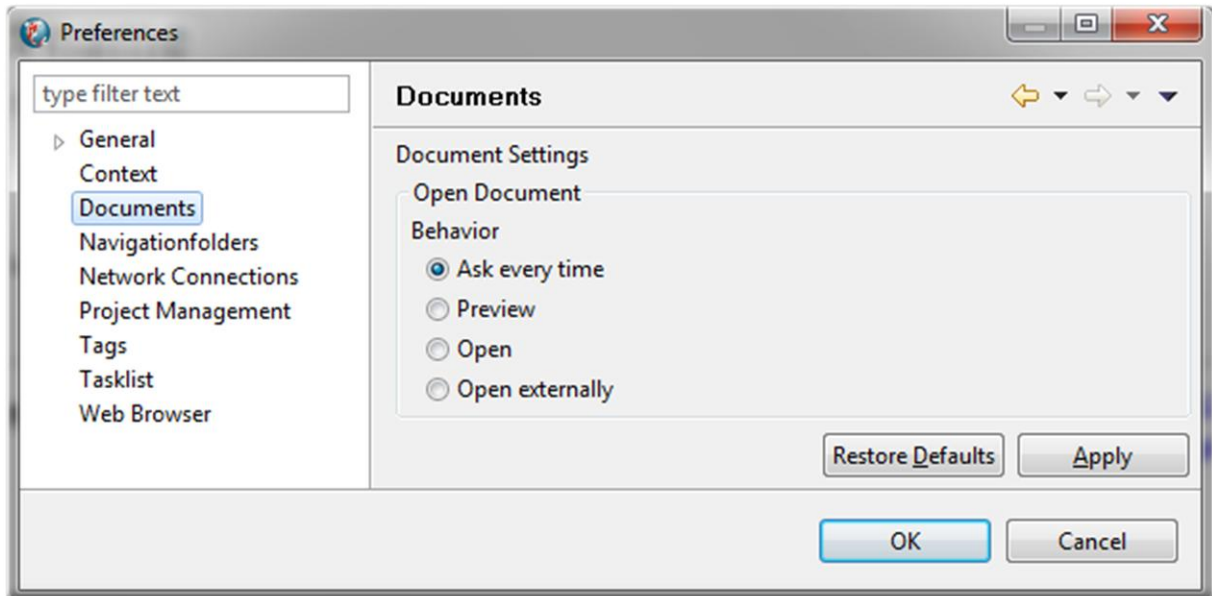
- Intelligent data entry assistant

Define the characters for the entry assistant by entering a new character and confirming it with Enter.

For help on the Intelligent data entry assistant see "SmartAdd" chapter on page 17.

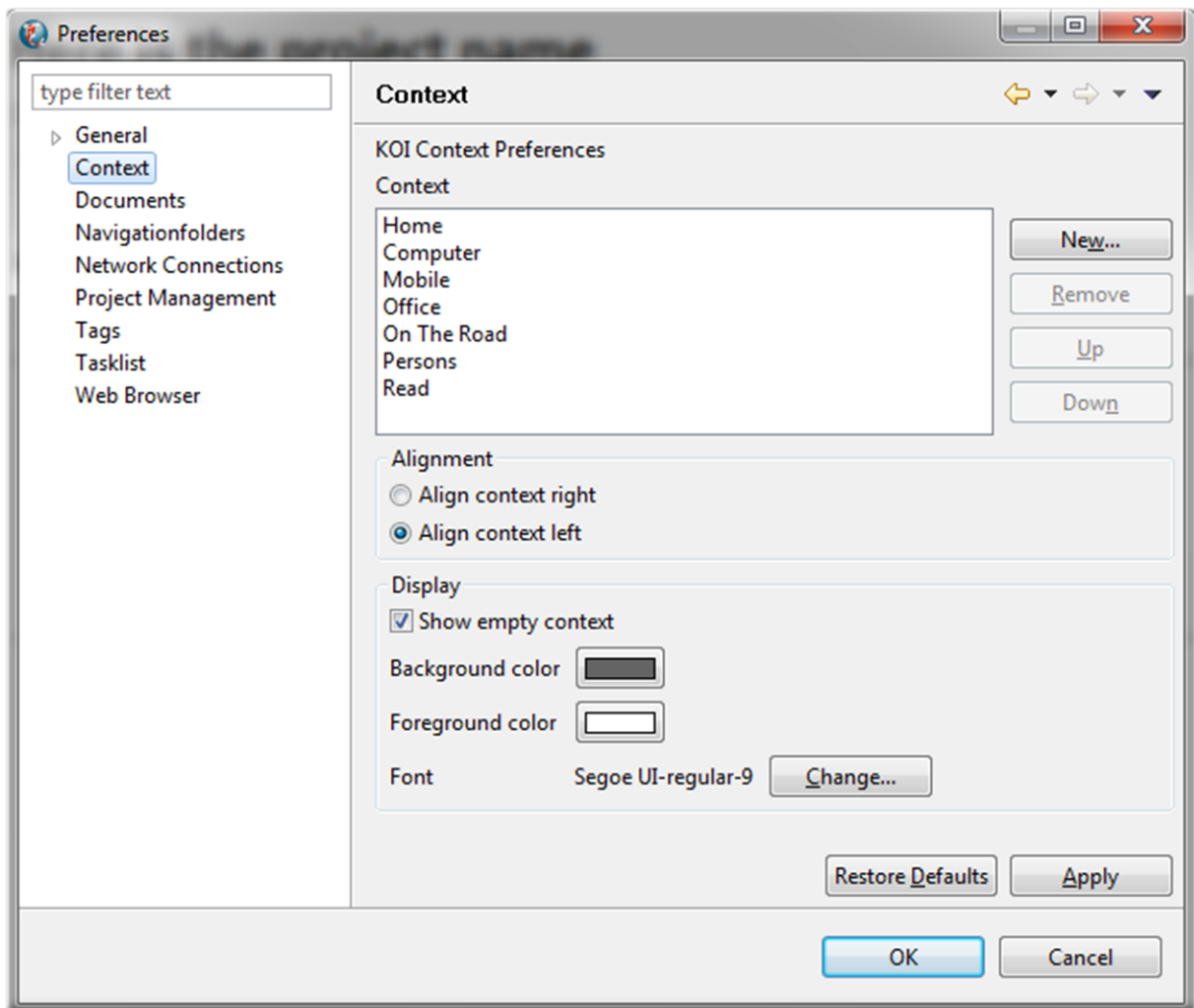
Documents

When a document is opened the appropriate program must be opened. Here you can specify if and how the program is opened.



Ask every time:	A dialogue box opens asking you every time how the document should be opened.
Preview:	The document is displayed in preview mode.
Open:	The document is displayed in a tab directly in KOI.
Open externally:	The document is opened in a program, outside of KOI.

KOI Context



Click **New** to create a new context. Enter the name of the context and confirm it with Enter. Sort the order of the contexts by selecting a context and clicking **Up** or **Down**. In order to remove a context, select the particular context and click **Remove**.

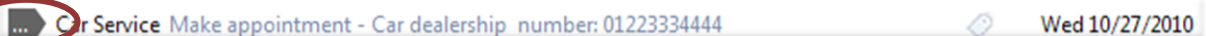
Align context right: The contexts appear in the work list on the right hand side next to the task titles.


 A screenshot of a work list entry. The text 'appraisal interview agree on a date' is on the left. On the right, the word 'Work' is in red, followed by a button labeled 'Computer' which is circled in red, and then the date 'Tue 10/12/2010'.

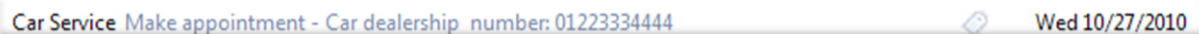
Align context left: The contexts appear in the work list on the left hand side next to the task titles.


 A screenshot of a work list entry. On the left, a button labeled 'Computer' is circled in red, followed by the text 'appraisal interview agree on a date'. On the right, the word 'Work' is in red, followed by the date 'Tue 10/12/2010'.

"Display empty context" activated:


 A screenshot of a work list entry. On the left, a button with three dots is circled in red, followed by the text 'Car Service Make appointment - Car dealership number: 01223334444'. On the right, there is a small icon, the date 'Wed 10/27/2010', and a red 'Work' label.

Display in the work list without empty context:


 A screenshot of a work list entry. The text 'Car Service Make appointment - Car dealership number: 01223334444' is on the left. On the right, there is a small icon, the date 'Wed 10/27/2010', and a red 'Work' label.

Background colour: here you can set the background colour of the context as it appears in the work list.

Font colour: here you can set the font colour of the context as it appears in the work list.

Font: here you can set the font of the context as it appears in the work list. To do this, click **Change**, choose the font style and confirm the entry with **OK**.

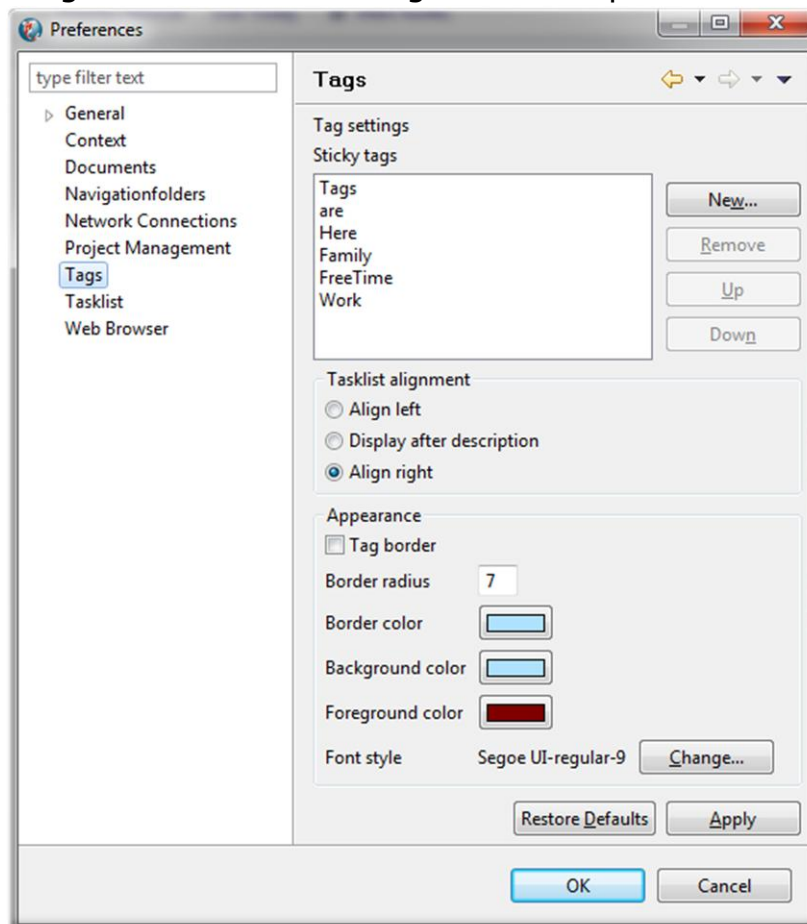

 A screenshot of a work list entry. On the left, a button labeled 'Mobile' is circled in red, followed by the text 'Car Service Make appointment - Car dealership number: 01223334444'. On the right, there is a small icon, the date 'Wed 10/27/2010', and a red 'Work' label.

In order to reset the default settings click the **Reset default settings** button.

In order to apply the selected settings in the work list click the **Apply** button.

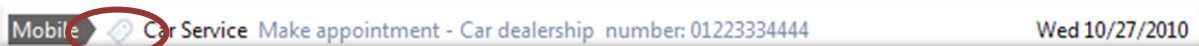
Tags

Here you can create new tags and change existing ones. You can also assign tags which are not listed here. The purpose of these settings is to manage the tag list. To do this, delete old tags which are not required any more or change the order of the tags to make quicker entries.

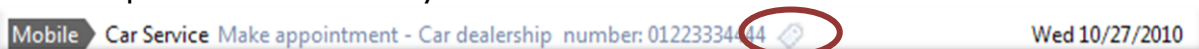


Click **New** to create a new tag. Enter the name of the tag and confirm with Enter.

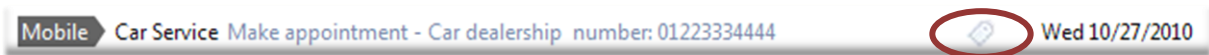
Align left: The tags of activity appear on the left hand side of the work list.



Display after description: The tags are displayed according to the description of the activity.



Align right: The tags of activity appear on the right hand side of the work list



• Appearance

Tag borders: For the sake of clarity the tags in the work list are framed.

Border radius: The higher the value, the rounder the frame around the tag. If you enter the value 0, the frame is rectangular, if you enter the highest value 30, the frame is elliptical.

Value 7:



Value 20:



Border colour: Here you can specify the frame colour of the tags. Click on the colour field and choose a colour. After confirming with **OK** the colour of the frame will have changed.

Background colour: Here you can specify the background colour of the tags. Click on the colour field and choose a colour. After confirming with **OK** the background colour will have changed.

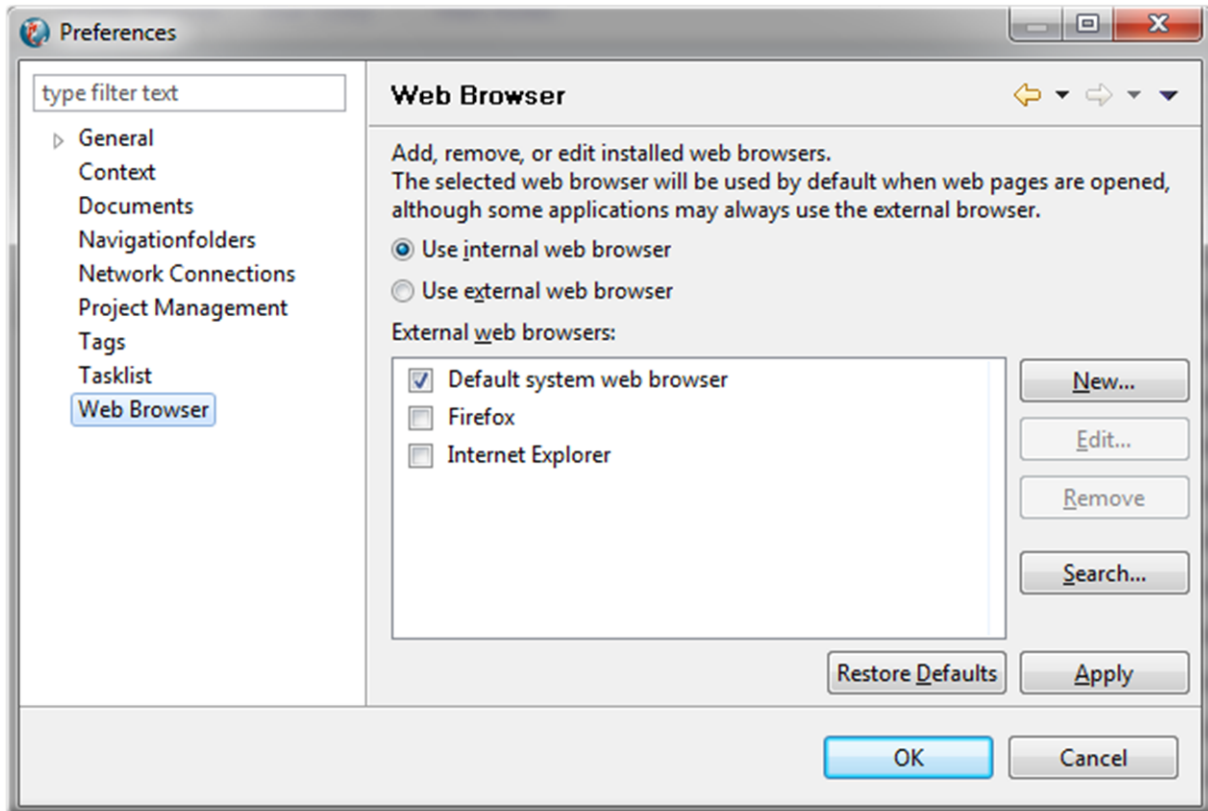
Foreground colour (font colour): Here you can specify the font colour of the tags. Click on the colour field and choose a colour. After confirming with **OK** the font colour will have changed.

Font style: Here you can set the font of the tags as it appears in the working list. Click **Change**, choose the font and confirm the entry with **OK**.

In order to reset the default settings click the **Reset default settings** button.

In order to apply the selected settings in the work list click **Apply**.

Web Browser



You can open the web browser by displaying it in a new tab directly in KOI. To do this, activate the upper check box "Use internal web browser". If you want the web browser to open externally in another window, activate the lower check box "Use external web browser".

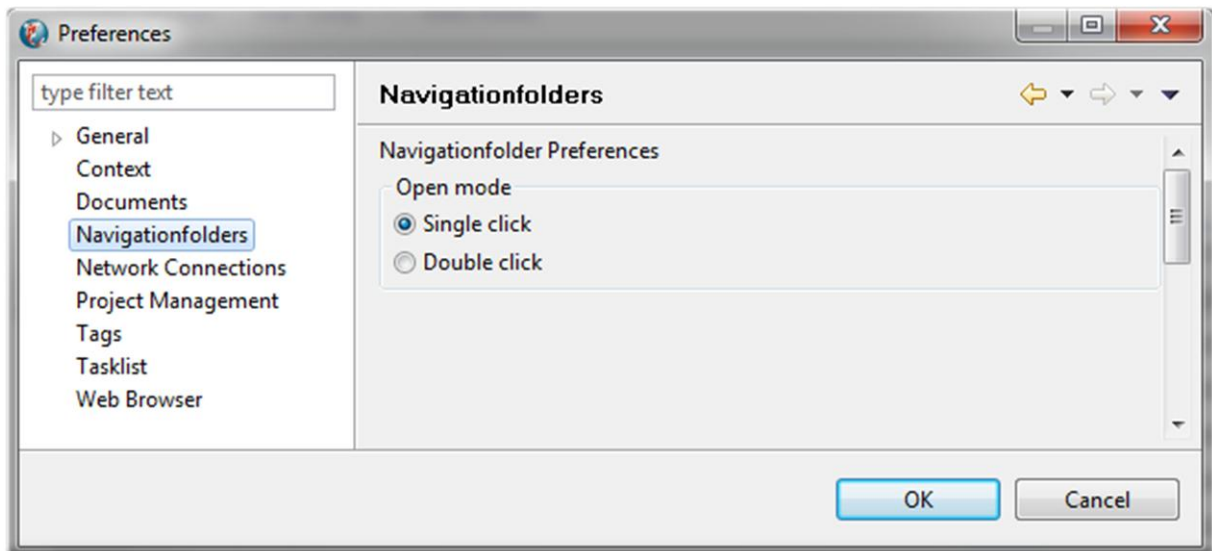
- External web browsers

Here you can specify which web browser you want to use.

In order to add another browser click **New** and enter the browser name and path or click "Search" and choose your browser.

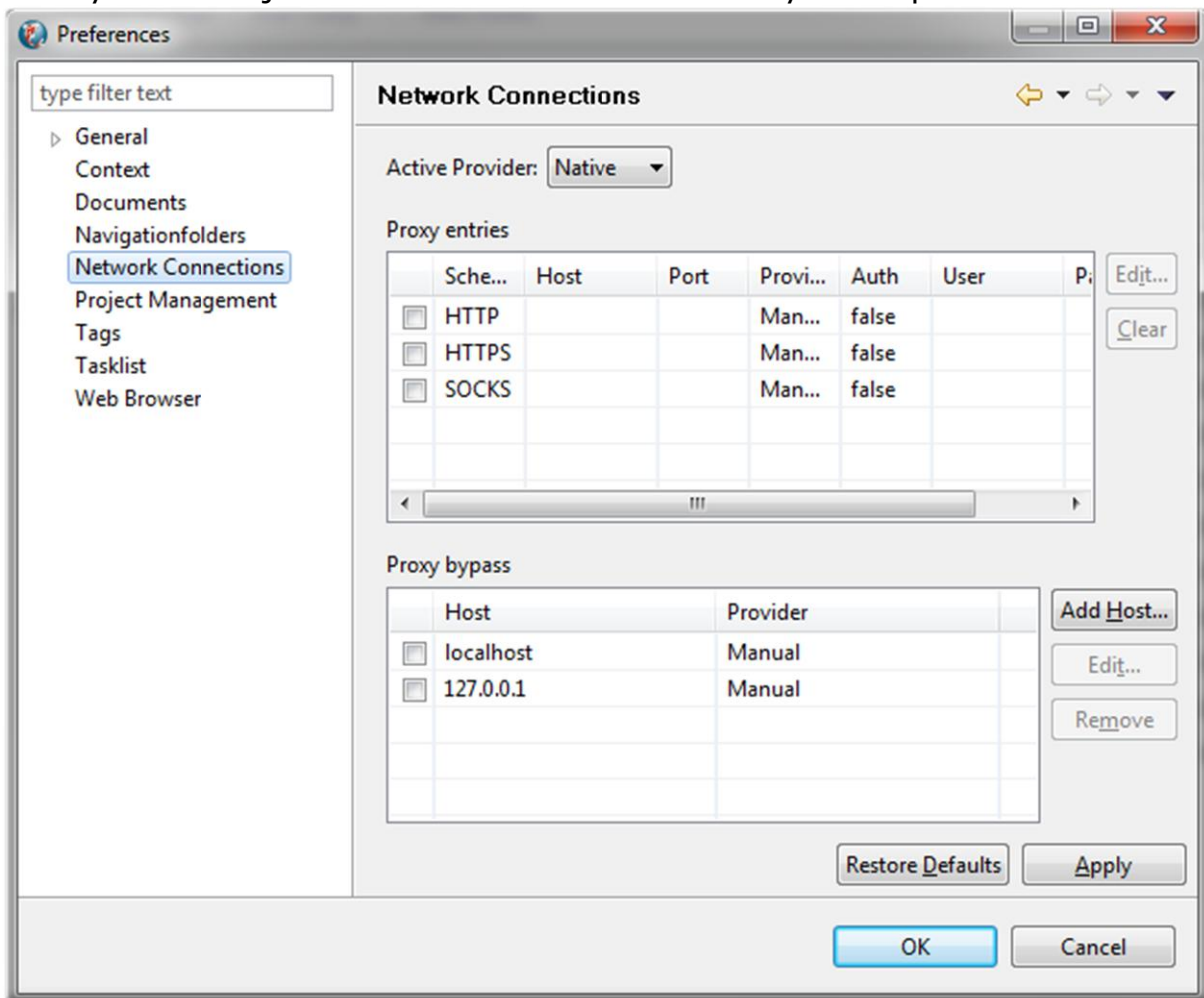
Navigationfolders

Here you can choose whether you want to single click or to double click to open a folder out of the navigation area.



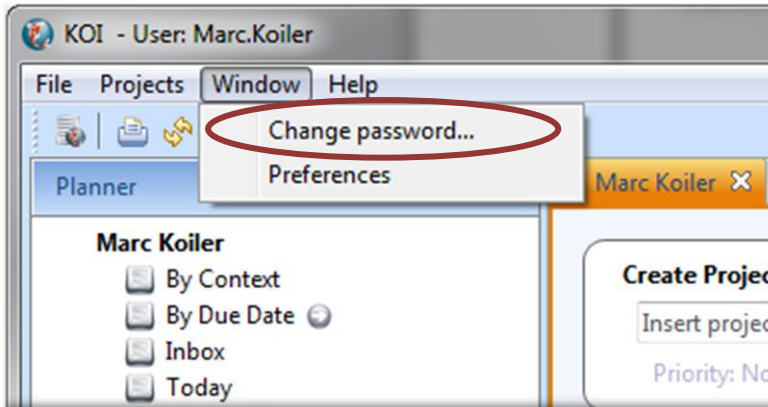
Network Connections

Here you can adjust the network connections to your requirements.

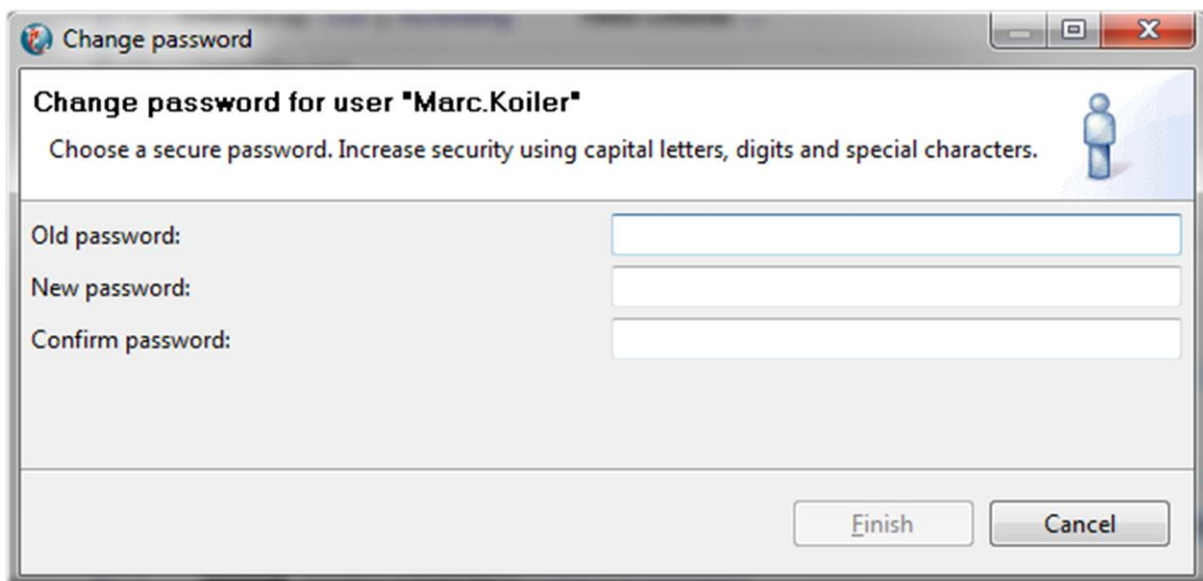


Change password

Click **More** and then click **Change password** on the menu bar.



For verification you have to enter your old password and then enter twice your new password.



Now click **Finish** to confirm the changes. Your password has been changed.



KOI KOMMUNIKATION
ORGANISATION
INFORMATION